

CHARITABLE GIVING FUNDS



A Charitable Giving Fund is a philanthropic program established with the Raymond James Canada Foundation. It allows you to make a charitable donation, receive the immediate tax benefit, and then recommend grants to be distributed to registered Canadian charities on your own timetable.

1. Make an irrevocable donation of cash, publicly traded securities, or other financial assets.
2. Immediately receive the donation tax receipt which can be claimed as a tax credit in the current year or carried forward for up to five years.
3. Name the fund and any successor advisors.
4. Your donation is invested in a charitable giving fund account where it is professionally managed by Raymond James and grows tax free.
5. Every year you recommend grants to registered Canadian charities, which the Raymond James Canada Foundation will distribute on your behalf.

It's like having your own foundation without the administrative costs and burdens. You choose the charities and we do the rest.



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A Charitable Giving Fund with the Raymond James Canada Foundation offers:

- ✓ **An easy process to establish a fund**
- ✓ **Flexible granting options**
- ✓ **Low administration costs**
- ✓ **Professional investment management**
- ✓ **A strategic approach to your charitable giving**

Speak with your Raymond James Advisor for more information

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